

## ACCOUNTANTS

## AuxiliAccounting

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CHRISTA SKOUPY  
CPA

**Core Business**

Boutique accounting and business advisory firm serving local and international clients

**Services**

Corporate and Personal Income Tax Preparation, FBAR Filing, Accounting & Bookkeeping, QuickBooks Training & Consultation, and Incorporation & Formation Consultation

**Homebase**

Brooklyn, NY

**Business Launch**

2002

**Employees**

4 Full Time

**Technology of Choice**

SmartVault, QuickBooks, Expensify

**Moving forward with technology**

Fast-growing practice attributes part of its success with making the move to SmartVault

Christa Skoupy, CPA is on track for immense growth in the coming years. She shared that her firm has grown at a rate of about 17% per year over the past three years. And she links this success with technology, specifically SmartVault.

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Prior to using SmartVault, Skoupy emailed encrypted PDFs to clients, which she acknowledged was not an efficient process for document exchange. “Sometimes we had to email a client numerous times because they would lose the email or forget to download a document. It really became time consuming. We needed to organize our processes.”

In 2013, Skoupy learned about SmartVault after attending a CPE course. The facilitator talked about streamlining processes, and this included the use of portals and online document exchange. The instructor mentioned SmartVault by name. From there, Skoupy did her research and quickly implemented the system.

She found the system incredibly intuitive for both her firm and her clients. “It’s so easy. The majority of our clients were on board right away.”

The next big step was to implement SmartVault’s Connected Desktop, which she said has further improved processes and helped to streamline overall operations. “I can go into our tax software [ProSeries] and pull the info into Connected Desktop so that everything I need is there. SmartVault knows what kind of engagement it is and populates with all the proper folders. It’s so helpful,” Skoupy said.

Always looking for the next great thing, Skoupy is excited about the newly released built-in digital signature feature. In previous years, she used a third-party e-signature solution, which didn’t integrate with SmartVault. This meant adding extra steps to her process.

“I’m looking very forward to using e-signature in SmartVault. It will save me the three extra steps it takes me to get a signed document into the system. Over the course of a year, this will add up to big time savings. I’m always looking for ways to further streamline processes.”

When asked to summarize the top three benefits of using SmartVault, she ranked them in the following order:

**1 Efficiency:** *"We see great gains in efficiency internally, but I'm most pleased with the time-savings in client communications."*

**2 Organization:** *"The level of organization we've been able to put in place is great. The file structure is intuitive, so we can easily locate files at any time."*

**3 Value:** *"The solution is reasonably priced, which allows a smaller practice to offer the same level of service as a big firm."*

Honorable mention went to support. Skoupy commended the SmartVault team on being committed to consistently updating the product with helpful, time-saving features. She also finds the training options valuable. And, in those times of need, she stated with great confidence, "SmartVault has so many options that you can always easily find support when you need it."